

EXHIBIT J



Agent Knowledge - Daily Checklist

V 3.0

This checklist is designed to be utilized at the beginning of every day to help reinforce agent knowledge of the Assurance Wireless program. Please review this with each agent in your office to ensure that all basic knowledge has been covered. It includes most major training items that the agents should know/say/remember for every application. (i.e. opening pitch verbiage, attestations, magnets, etc.). It also speaks to what every agent should have with them as a minimum to do their jobs every day and be compliant. *This does not replace the online training. That is mandatory for every agent to complete and pass prior to marketing in the field.*

What every agent should have with them as a minimum to do their jobs every day and be compliant.

1. Appearance

- ✓ Clean, professional, personal appearance
- ✓ Lanyard
- ✓ Name Badge
- ✓ Assurance Wireless T-Shirt unless otherwise agreed by management
- ✓ Agent Code
- ✓ Brochures

2. Hardware

- ✓ A fully charged working tablet
- ✓ Writing instrument (Pen)
- ✓ Non CA states need Attestations; CA agents need to have the CA Service/Product Disclosures booklet on them at all times
- ✓ Magnets
- ✓ Slingpack (AW bag)
- ✓ Fully charged phone for contact with the office, manager or auditor that may be in the field
- ✓ Electronic/soft copies of:
 1. Child benefit form
 2. List of acceptable documents to complete an app, such as food stamp card, Medicare card, etc. *Reference the State by State Simple Sheets that can be provided by your Assurance Wireless National Account Manager.*
 3. A link on the tablet to the Assurance Wireless training environment
 4. Assurance Wireless contact numbers for the help desk and to customer service

Assurance Wireless App and Login Help Line: 855-245-6734.
Application Process Help Line: 888-898-4888.

3. Events/Site Locations Marketing Materials

- ✓ Make sure you have, and display, any necessary permits
- ✓ Have all events, and event locations, approved by Assurance
- ✓ If using a table then you must have an AW Table Cloth, brochure holder, brochures, table flyers
- ✓ Signage and marketing collateral should be utilized at all locations unless they are not permitted by city code/ordinance, law, or agreement with building owner. *Please reference the Marketing Catalog for a full list of marketing items available to you for order. Your National Account Manager can provide it to you.*
- ✓ Make sure all materials are clean and operational.
- ✓ Ensure that agents are not congregating with competition, and are far enough removed from competitors tables and signage as not appear to be working with them.



Agent Knowledge - Daily Checklist

V 3.0

What every agent should cover in every applicant interaction as a minimum in order to be compliant.

1. Pitch

- ✓ Agents must interact professionally with customers. Aggressive sales tactics are prohibited at all times.
- ✓ Example: "Would you like to find out if you **qualify** for free **lifeline service** from **Assurance Wireless**?"
- ✓ Are you eligible for a free phone from Assurance Wireless
 - if no, ask why to overcome objections
 - I already have a phone – if it is a competitor's phone, explain benefits and the ability to transfer if they have had the phone between 31 – 60 days or more than 60 days
 - Sell the brand and benefits of Assurance Wireless and the plan
 - If they have applied already in the last 60 days, do not fill out another App
 - if yes, hand them the attestations to review while the agent is filling out the App
 - It will keep them busy and at ease while the agent fills out the app
 - It will allow them to review and ask any question at the end of the process

2. Qualification

- ✓ know what programs make a person eligible for Lifeline Service in that state
- ✓ know the rules for qualifying someone via their child's benefit program
 - i. application must be in parent/guardian name
 - ii. but must utilize the child's document as proof of eligibility
- ✓ A statement must be included stating they are the parent/guardian of the child listed on the benefit proof.
- ✓ Agents must ask potential applicants if they currently have a lifeline phone with AW or any other carrier and agent must inform applicant they are only eligible for one phone; and if approved by AW their service with another carrier will be transferred to Assurance Wireless.
- ✓ Agents must ask potential applicants if they have applied with AW or any lifeline carrier recently. If they answer in affirmative agents must ask applicant if they are still waiting for a decision to be made, if they are agent must inform them they cannot submit an application.
- ✓ The difference between Medicaid and Medicare (Medicaid will get you paid! ☺)

3. Documentation -

- ✓ Ensure you have the correct and clear supporting documentation (picture attachments)

4. Program Information –

- ✓ Be knowledgeable on the program specifics (i.e. how many minutes are provided, for how long, additional add on programs like data/web access, phone specifics, top up cards, etc.)
- ✓ Annual Recertification knowledge

5. PIN and Security Question

- ✓ Make sure you ask for the six digit pin and the favorite city and document the pin on the magnets
- ✓ Use the magnets
- ✓ Be able to explain *why* they need to remember their 6 digit PIN and Favorite City answer
- ✓ Agents must summarize the attestations for every applicant, even though they provided them with takeaways, and must ask for and receive applicant permission to accept on their behalf.
- ✓ Agents must provide every applicant with the AW magnet with their PIN written. It is the agent responsibility to ensure they have enough magnets to provide one to every applicant.

6. Fulfillment Timeline

- ✓ Set the proper delivery time for the phone
 - NLAD states - The approval process usually takes 3 to 5 business days.
 - Non NLAD states – The approval process usually takes 7 to 10 days due to post card processing rules.
 - CA – the approval process usually takes 3 to 5 business days.